MEMBER SERVICES DIVISION DASHBOARD

CalPERS

STRATEGIC GOALS

VI. Administer pension benefit services in a customer oriented and cost effective manner.

Service Credit Cost Requests Completed

Better →

INITIATIVES: *Improve Customer Service*

Initiatives	Milestones
• Continue filling Service Costing positions immediately upon vacancy. • Continue functional training of Service Credit Costing staff. • Continue MBSD metrics program to monitor incoming and outgoing workload.	• Timely completion of recruitments and hiring process. • New staff attend MBSD functional training program and are assigned a training mentor. • Review monthly metric data to ensure targets are on schedule.

4th Quarter 2007-08

MEASURE:

Percent of service credit cost requests completed, compared to the number received.

Target: *100%*

Year	Q1	Q2	Q3	Q4
2007-08	126%	111%	108%	96%
2006-07	106%	95%	115%	100%

COMMENTS:

- This table represents the number of service credit cost requests each quarter, in comparison to the number received.
- The number of service credit cost requests completed in a quarter can exceed 100% of the number received. This occurs because the completed requests include a combination of requests received during a quarter and requests already in the inventory. There is normally an existing working inventory, which was 2,913 requests at the end of the recent Quarter 4.
- The percentage of completed service credit cost requests can fluctuate each quarter depending on increases and decreases in the number of requests received.
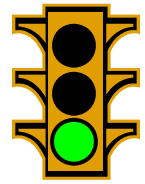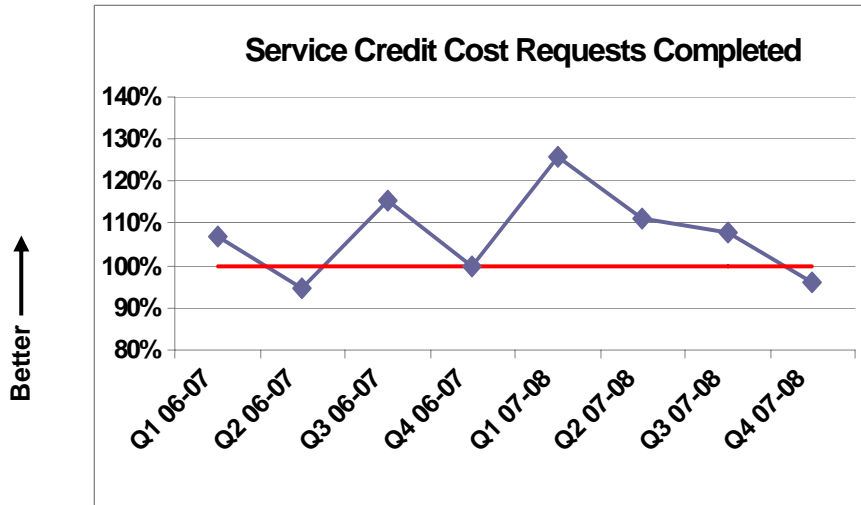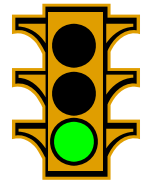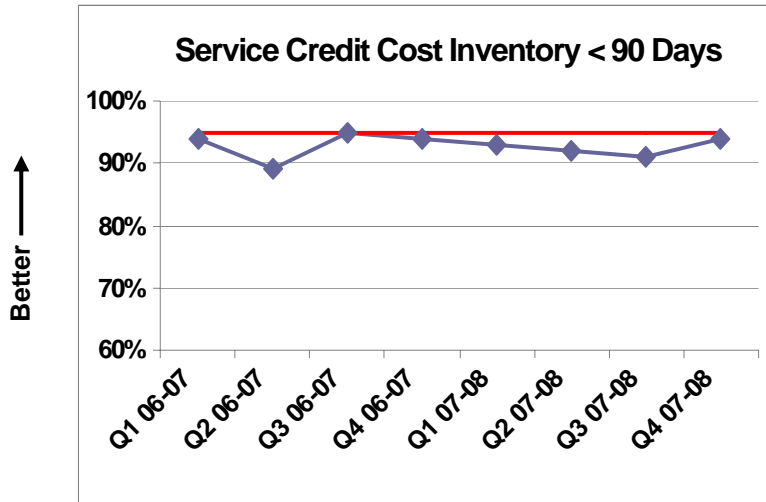
MEMBER SERVICES DIVISION DASHBOARD

STRATEGIC GOALS

VI. *Administer pension benefit services in a customer oriented and cost effective manner.*

Service Credit Cost Inventory < 90 Days

Better → (y-axis label)

MEASURE:

Percent of service credit cost requests completed within 90 days of receipt.

Target: *95%*

Year	Q1	Q2	Q3	Q4
2007-08	93%	92%	91%	94%
2006-07	94%	89%	95%	94%

INITIATIVES: *Improve Customer Service*

Initiatives	Milestones
• Continue filling Service Credit Costing positions immediately upon vacancy. • Continue functional training of Service Credit Costing staff. • Continue MBSD metrics program to monitor incoming and outgoing workload.	• Timely completion of recruitments and hiring process. • New staff attend MBSD functional training program and are assigned a training mentor. • Review monthly metric data to ensure targets are on schedule.

4th Quarter 2007-08

COMMENTS:

- This table represents all service credit cost workload inventory and the percentage of inventory aged less than 90 days.
- 100% completion rate cannot be attained due to items that are constrained for such reasons as missing employer payroll data, reviews by other divisions, pending legal decisions, etc.
- Most Present Value cost requests are constrained for 60 days due to staff waiting for current month payroll to post.
- There was a slight increase in the cost requests completed within 90 days from 91% in Q3 of 2007-08 to 94% in Q4. This is due to increased number of constraint cases we received information on and were able to work prior to the end of Q4.
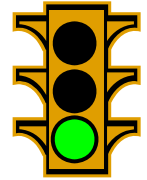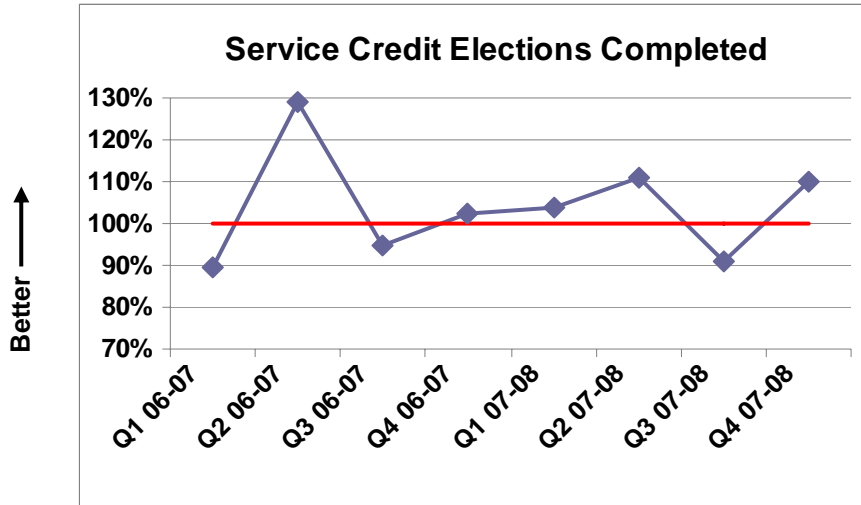
MEMBER SERVICES DIVISION DASHBOARD

STRATEGIC GOALS

VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Percent of service credit elections completed, compared to the number received.

Service Credit Elections Completed

Target: *100%*

Year	Q1	Q2	Q3	Q4
2007-08	104%	111%	91%	110%
2006-07	90%	129%	95%	102%

INITIATIVES: *Improve Customer Service*

| Initiatives	Milestones
• Continue filling Service Credit Election positions immediately upon vacancy. • Continue functional training of Service Credit Election staff. • Continue MBSD metrics program to monitor incoming and outgoing workload.	• Timely completion of recruitments and hiring process. • New staff attend MBSD functional training program and are assigned a training mentor. • Review monthly metric data to ensure targets are on schedule.

COMMENTS:

- This table represents the number of service credit election requests completed each quarter in comparison to the number received during the same quarter.
- The number of service credit election requests completed in a quarter can exceed 100% of the number received. This occurs because the completed requests include requests received during a quarter and requests already in the work inventory.
- The percentage of completed service credit election requests can fluctuate each quarter depending on increases and decreases in the number of requests received.

4th Quarter 2007-08

ATTACHMENT B-8
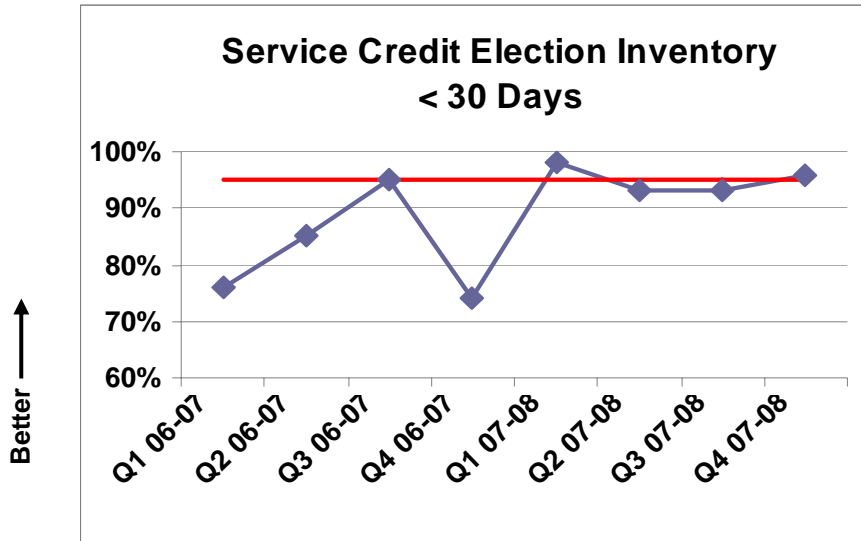
MEMBER SERVICES DIVISION DASHBOARD
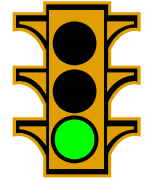
STRATEGIC GOALS

VI. Administer pension benefit services in a customer oriented and cost effective manner.

MEASURE:

Percent of service credit elections processed within 30 days of receipt.

Service Credit Election Inventory < 30 Days

Better →

Target: *95%*

Year	Q1	Q2	Q3	Q4
2007-08	98%	93%	93%	96%
2006-07	76%	85%	95%	74%

INITIATIVES: *Improve Customer Service*

Initiatives	Milestones
• Continue filling Service Credit Election positions immediately upon vacancy. • Continue functional training of Service Credit Election staff. • Continue MBSD metrics program to monitor incoming and outgoing workload.	• Timely completion of recruitments and hiring process. • New staff attend MBSD functional training program and are assigned a training mentor. • Review monthly metric data to ensure targets are on schedule.

COMMENTS:

- This table represents all service credit election inventory and the percentage of inventory aged less than 30 days.
- 100% completion rate cannot be attained due to items that are constrained, for such reasons as financial institution delays for pending rollovers, incomplete paperwork submitted by member, pending legal decisions, etc.
- The measure increased from 93% in Q3 to 96% in Q4, while the service credit election inventory decreased from 536 to 280 items. There is a fairly consistent number of constrained items in the inventory at all times; however, the number of constrained items decreased from 40 in Q3 to 11 in Q4.

ATTACHMENT B-9

4th Quarter 2007-08